



## DIRECTORY UPDATE V1.6 Quick Install Guide

**Directory Update** is an easy-to-use, customizable, Web-based utility that allows an end-user to update their own information in the Active Directory and thus to the Exchange Global Address List.

This document is intended to provide you with a quick reference for getting **Directory Update** installed. It is intended as a supplement to the full **Directory Update** documentation.

### Tips

Here are some tips and information that will make your work with **Directory Update** easier and more trouble-free.

- Get yourself a good XML editor; that will make editing the XML files much more painless. We recommend Notepad++; a very good and free text editor. <http://notepad-plus.sourceforge.net>
- Directory Update is solely designed as a "self service" tool; one user is not allowed to update another user's information.
- The end user accesses the site using a Web browser and a URL similar to <http://ServerName/DirectoryUpdate>
- All updates to the Active Directory are done using a service / proxy account, not via the currently logged on user's credentials.
  - Create a service/proxy account that has the permissions necessary to update all users.
  - The service/proxy account's password should not expire.
  - Members of Account Operators cannot update other operator or administrative users. This is a Windows security feature.
- Almost all customization and configuration is performed in one of three XML files found in the `c:\inetpub\wwwroot\DirectoryUpdate\Settings`
  - `DirectorySettings.XML` contains the field/attribute configuration such as which fields show up on the Edit interface, which fields are hidden, drop-down list values, etc...
  - `AppSettings.XML` allows you to customize the search options, window labels, error/help messages, and narrow the scope of a search to a single OU.
  - `AddressSettings.XML` allows you to specify an attribute such as Office name that, when selected, will automatically read the office address (street, city, state, postal/zip code, and country) and populate that for the user.
- Always make backup copies of your XML files.
- XML tags must have an "open" tag and a "close" tag.



- Photo support requires that the NETWORK SERVICE be given "Modify" permissions to the `c:\inetpub\wwwroot\DirectoryUpdate\photos` folder.
- You can install the evaluation version and later run the Configuration wizard to add a license key so that it no longer expires.

## Prerequisites

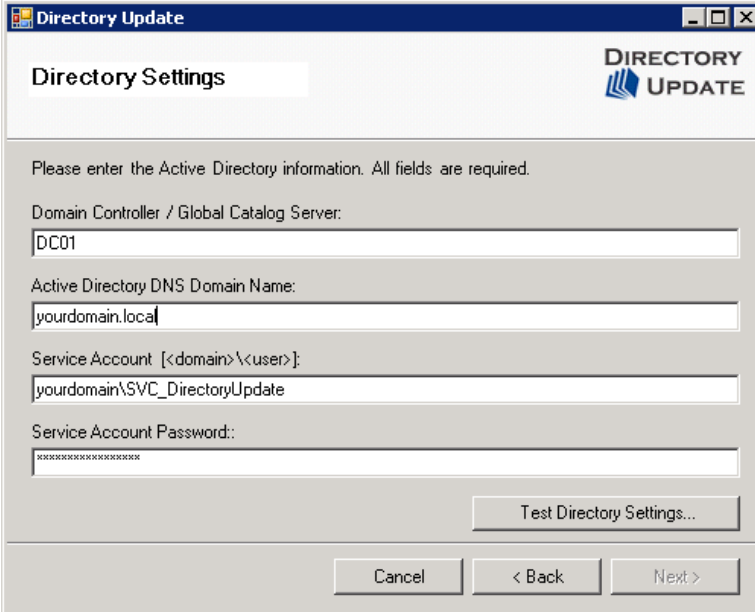
Make sure that your server meets all of the prerequisites and your installation will go much more smoothly.

- Server requirements
  - Windows Server 2003 with SP1 or later
  - IIS Web service installed
  - Microsoft .NET Framework v2.0 installed
  - Server must be a member of the domain/forest
  - In IIS Manager under Web Service Extensions, make sure that ASP.NET v2.0.50272 is visible and Allowed
- Create a service/proxy account that has permissions to update user accounts.
- Have a domain user account that is also a member of the IIS Server's local Administrators group to do the installation
- Download the latest version of the **Directory Update** software from our Web site.

## Installation

Installation is usually simple and quick though the software will be installed with the default XML templates and you will need to customize these for your organization.

1. Run the **DirectoryUpdate.MSI** installer
2. You can take most of the defaults for the installer including the default virtual directory name (**/DirectoryUpdate**) and putting the site on to the Default Web Site.
3. On the Directory Settings screen, enter the domain controller name, the domain name, the service account information, and the service account password.



4. Click the Test Directory Settings button and click Next
5. Enter the organization name and the license key (or check evaluation version)
6. Finish the installation
7. If on a domain controller, give the NETWORK SERVICE account "Modify" permissions to the folder:  
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files
8. If using the Photo feature, give the NETWORK SERVICE account "Modify" permissions to the folder:  
c:\inetpub\wwwroot\DirectoryUpdate\Photos
9. Customize the XML files to suit your organization.

## Customization Quick Reference

Customizing the **Directory Update** interface for your specific requirements is reasonably simple once you have taken a look at the XML files that store the configuration and if you get yourself a good XML editor. The XML files are all found in the following folder:

C:\inetpub\wwwroot\DirectoryUpdate\Settings

Each attribute / field on the user interface has some of the same basic options:

- Each field label can be changed
- Each field type can be text, dropdown, or combo
- Each field can be hidden / unhidden
- Each field can be made read only or editable
- Each field can have a default value
- Each field can have a validation format assigned to it
- Each field can have example text

Below is an example of the Organization section and two fields (company and office.) This will give you an idea of some of the types of customization that can be done.

```

44 <!-- ORGANIZATION SECTION -->
45 <organization label="Organization" visible="yes">
46   <company label="Company" type="dropdown" visible="no" editable="yes" required="no"
      validationFormat="" defaultValue="" example="">
47     <value>Ithicos Solutions</value>
48     <value>Somorita Surfboards</value>
49     <value>Volcano Surfboards & Smoothies Shop</value>
50     <value>Bob's Boogie Boards</value>
51   </company>
52   <office label="Office" type="text" visible="no" editable="yes" required="no" validationFormat=""
      defaultValue="" example=""></office>

```

The DirectorySettings.XML and AddressSettings.XML files CAN be interchanged with **Directory Update**. The AppSettings.XML file cannot be used with our other programs.

The following are the attribute/field options and possible values:

Option	Description and possible values
label	Allows you to change the text label on the interface
type	Sets the field type. Options are "text", "dropdown", and "combo"
visible	Sets the attribute to visible or hidden. Options are "yes" or "no"
editable	Allows the user to either edit the field or



	have it appear read-only. Options are "yes" or "no".
required	Sets the field so that a value must be entered or selected. Options are "yes" or "no".
validationFormat	Allows you to specify a validation format name (defined at the bottom of the XML file) that controls the required format/structure.
defaultValue	Allows you to specify a default value for the field. If using a dropdown list, the default value must be in the dropdown list also. The default value will only be used if the Active Directory attribute is empty.
example	Allows you to specify sample text that will show directly below the field. As long as it is set to example="", the sample text will not show up.

Here is the company name tag that has been configured as a drop-down list. Notice that for company, within the "open" and "close" tags there are tags for each option in the drop-down list.

```
<company label="Company" type="dropdown" visible="no" editable="yes"
required="no" validationFormat="" defaultValue="" example="">
  <value>Ithicos Solutions</value>
  <value>Somorita Surfboards</value>
  <value>Volcano Surfboards & Smoothies Shop</value>
  <value>Bob's Boogie Boards</value>
</company>
```